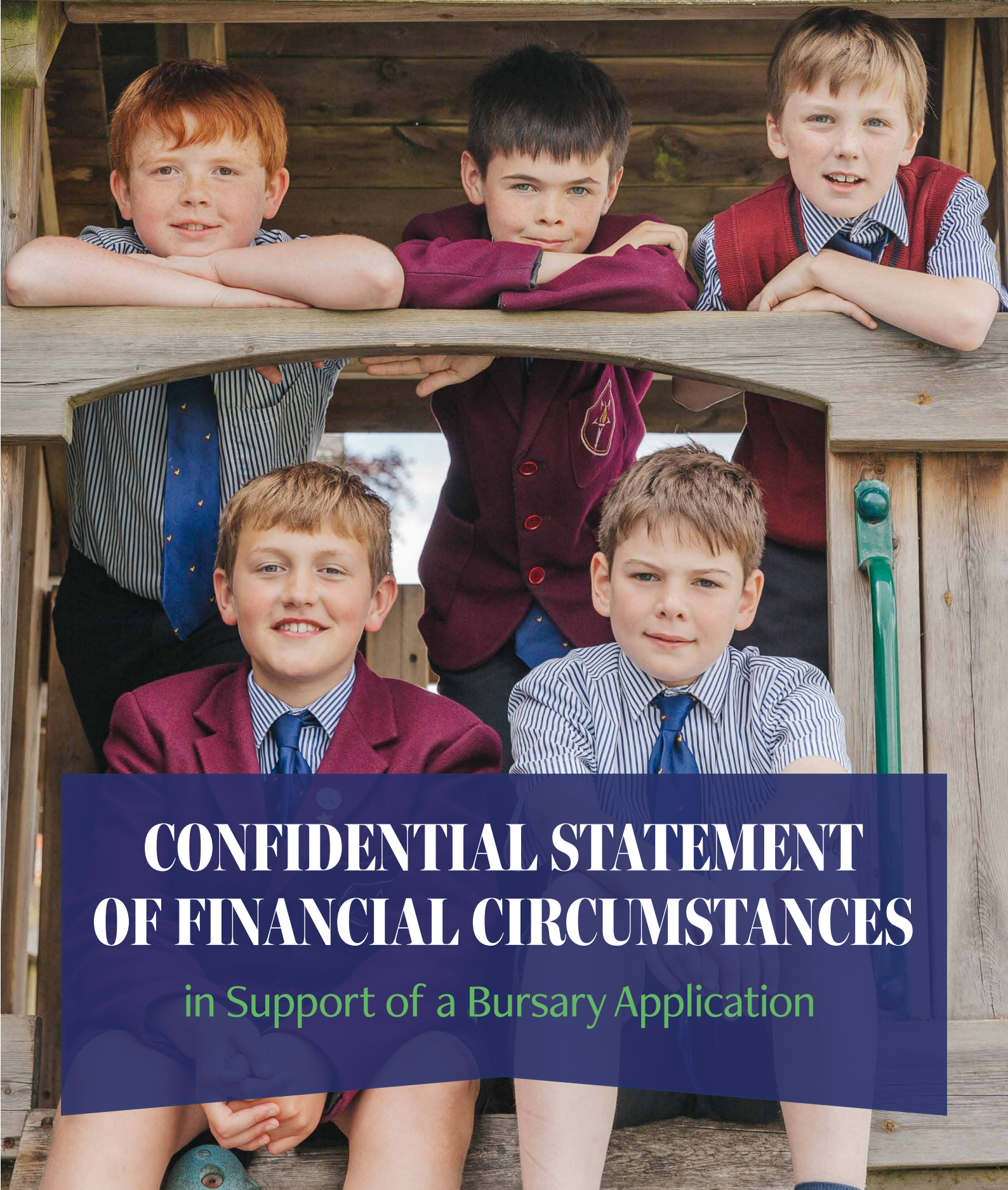




**THE BEACON**  
Guiding the next generation



# **CONFIDENTIAL STATEMENT OF FINANCIAL CIRCUMSTANCES**

in Support of a Bursary Application



PLEASE READ THE NOTES FOR GUIDANCE ON PAGES 7&8 BEFORE COMPLETING THIS FORM.

Completed forms should be scanned, together with necessary documentary evidence, and submitted by email to the Director of Finance & Operations at [dfo@beaconschool.co.uk](mailto:dfo@beaconschool.co.uk)

## 1. Your Child's Details

Full Names \_\_\_\_\_

Date of Birth \_\_\_\_\_

Term/Year of Entry (if not yet enrolled) \_\_\_\_\_

## 2. Parents'/Guardians' Details (see note 2)

Parent/Guardian 1

Parent/Guardian 2

Names \_\_\_\_\_

Address(es) \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Occupation \_\_\_\_\_

Retired – Employed – Self Employed – Unemployed (circle which applies)

Name & address of Employer or Business

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Are you a director  
or owner of this or business?      YES/NO      YES/NO

If "YES" state the share of the business you and/or your spouse/partner own

\_\_\_\_\_

E-mail address \_\_\_\_\_

Daytime Tel No \_\_\_\_\_

Evening Tel No \_\_\_\_\_

Mobile Tel No \_\_\_\_\_

## 3. Income (see note 3)

(Please enter below your current earnings and expected income from all sources for this tax year, April – March).

Parent/Guardian 1

Parent/Guardian 2

(a) Net salary and other similar earnings \_\_\_\_\_

(b) If self-employed, profits of business \_\_\_\_\_

(c) Pension received	-----	-----
(d) Interest received on savings accounts	-----	-----
(e) Net income from property	-----	-----
(f) Social Security benefits (including Child Allowance)	-----	-----
(g) Separation or Maintenance Allowance	-----	-----
(h) If there is a Court Order/Separation Agreement, please state annual amount payable for school fees, if any	-----	-----
(i) Any other income not included in (a) to (h) above	-----	-----

#### 4. Outgoings (see note 4)

	Parent/Guardian 1 £	Parent/Guardian 2 £
(a) Rent payable on your home, if any	-----	-----
(b) Mortgage payments (include capital repayment as well as interest)	-----	-----
(c) Endowment mortgage insurance	-----	-----
(d) Any other interest payable (please specify)	-----	-----
(e) Pension contributions(unless already deducted from net salary in 3(a))	-----	-----

#### 5. Assets Owned by You (see note 5)

	Parent/Guardian 1 £	Parent/Guardian 2 £
(a) Approximate value of:		
i) Building Society/Bank deposits	-----	-----
ii) Building Society/Bank deposits	-----	-----
ii) Shares and other investments	-----	-----
(b) Approximate market value of home, if owned (freehold/leasehold)	-----	-----
(c) Cash at banks or elsewhere (current accounts only)	-----	-----
d) Approximate value of any businesses which you own or share	-----	-----
e) Approximate market value of any other propertiesowned either at home or abroad	-----	-----
f) Redundancy, employment separation or lump sum payments	-----	-----

## 6. Liabilities -Amounts Owed by You (see note 6)

	Parent/Guardian 1 £	Parent/Guardian 2 £
(a) Mortgage - amount outstanding on house	-----	-----
Final paymnet date	-----	-----
(b) Other significant debts (please specify)	-----	-----

### Subtotals

Assests (5)	-----	-----
Liabilities (6)	-----	-----
Net Assets (5-6)	-----	-----

## 7. Dependent Children (see note 7)

(include the child to whom this application refers in column 1; if more than 4 children, give details on a separate sheet).

	1	2	3	4
(a) Forename	-----	-----	-----	-----
(b) Date of birth	-----	-----	-----	-----
(c) School	-----	-----	-----	-----
(d) Annual school or other educational fees if any	-----	-----	-----	-----
(e) Compulsory other school charges, if any	-----	-----	-----	-----
(f) Amount of fees in (d) covered by:	-----	-----	-----	-----
i) Scholarships, bursaries or other allowances given by school	-----	-----	-----	-----
ii) Savings scheme or insurance policy	-----	-----	-----	-----
iii) Other sources, e.g. gradparents, Trusts, Charities, etc	-----	-----	-----	-----

## 8. Other Dependents (see note 8) (please give details)

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### 9. Any Other Relevant Information (see note 9) (continue on extra sheet of paper if necessary)

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### 10. Verification of Information

Please enclose copies of as many of the following documents as possible, in support of the information you have provided us. Please tick those you are enclosing.

- ☐ P60, or March payslip
- ☐ Most recent payslip
- ☐ Self-employed Tax Return
- ☐ Other confirmation of self-employment income
- ☐ Last six months' bank statements (all accounts, including savings)
- ☐ Mortgage statement and any other loan statements

### 11. Declaration

After having read the attached notes, the following declaration should be signed by both parents/applicants (or see below):

We/I have read the notes and have made a complete and accurate declaration of our/my income and assets.

We/I understand that if we/I are/am offered a Grant for our/my child and accept a place for him/her at the school, the following terms and conditions will apply as between ourselves/ myself and the School:-

- a) our/my child's fees account with the School will be credited termly with the amount of the Grant for so long as the award remains in effect;
- b) any award of a Grant is subject to annual review and we/I must complete an annual declaration of our/my financial circumstances on the form sent to us/me by the School and supply all relevant supporting evidence by the return date indicated;
- c) we/I will report immediately any material change in the financial position declared;
- d) the Grant may be withdrawn or reduced if:
  - i) we/I act or our/my child acts in breach of the School's Terms and Conditions attached to the Acceptance Form for our/my child at the school;
  - ii) we/I have failed to return the annual declaration of our/my financial circumstances by the return date indicated;
  - iii) we/I have failed to produce any additional information required by the School to evidence our/my financial circumstances;
  - iv) in the opinion of the Head, our/my child's attendance, progress or behaviour no longer merits the continuation of the award;

- v) we/I are more than 28 days in arrears in respect of any amount due and owing to the School;
  - vi) there is a material change in our/my financial circumstances;
  - vii) the School's resources are insufficient to maintain the level of award.
- e) the Grant will be withdrawn and the value of any amount of the Grant previously credited against our/my child's fee account will become repayable to the School forthwith if we/I have fraudulently, knowingly or recklessly provided false information in relation to the award of the Grant.

**Signatures: (see Guidance Note 2) Please delete as appropriate**

Parent/Guardian \_\_\_\_\_ Date \_\_\_\_\_

Parent/Guardian \_\_\_\_\_ Date \_\_\_\_\_

## Notes for Guidance on Completion of Statement of Financial Circumstances

Before completing the form, please read these notes carefully, and contact the Director of Finance & Operations if further information or advice is required. These notes refer to the corresponding paragraph on the Form. The School reserves the right to seek any other documentary evidence in support of the income and asset figures submitted, and to make enquiries which it deems necessary.

### 2. Parents/Applicants

These are defined as:

- the natural father and mother of the child where they live together (whether or not they are married to each other) and the child normally resides with them both in the same household; or
- the parent of the child with whom the child normally resides and the partner (if any) of that parent where the partner normally resides with that parent and the child in the same household; or
- the child's legal guardian and the partner (if any) of that guardian where the partner normally resides with that guardian and the child in the same household; or
- the person with whom the child resides in accordance with a residence or Court Order; or
- where none of the above applies, the parent is the person with whom the pupil normally resides in accordance with any informal care or fostering arrangement and that person's partner (if any) where the partner normally resides with that person and the pupil in the same household.
- If parents are separated or divorced before or while their child attends the School, both mother and father will require to complete and sign the Application Form.

### 3. Income

- a) The net annual amount of salaries and wages, including any earnings from profit related pay, part-time employment and any sum received as bonus, commission etc, statutory sick pay, statutory maternity pay giving NET amounts (after deduction of tax, NI, superannuation, etc) for the current or latest financial year.
- b) Profits from a business or profession – at the amount of net profits agreed by the relevant tax authority for the year in question (deductions should be made only in respect of capital allowances, losses and stock relief). Copies of the latest set of accounts may be required.
- f) All social security benefits received should be declared and type of benefit specified.
- g) Court Orders, Legal Separation Agreements and Voluntary Arrangements for School Fees – Where a parent is required by a Court Order, or a legal binding separation agreement (eg Deed of Separation) to pay part of the School fees, then only that part of the fee which is not covered by the Court Order/agreement will be used to calculate any grant to be awarded. This is irrespective of whether or not the order or agreement is being complied with. Where the whole amount of the fees are required to be paid by virtue of a Court Order or separation agreement, applicants are not eligible for a grant. You should indicate how many years are payable and any annual variations. All receipts relating to maintenance payments, separation allowances and sums in respect of Child Support maintenance must be declared.

### 4. Outgoings

- b) Enter capital as well as interest payments for any mortgage on your home,
- c) Only complete this if repayment is effected by means of a full Endowment Policy.
- d) Include bank overdraft and other loan charges incurred during the year (specifying the purpose of the loan).

## 5. Parents'/Applicants' Assets

In addition to taking account of all relevant sources of income, the School takes account of the following items of value you may own:

- a) The capital sum of any monies on deposit with any bank, deposit taker or building society. Investments in stocks and shares, valued as near as possible to the date of submitting the application form.
- b) The current market value of your home, if owned by you. The current market value should be estimated by parents where a current valuation is unavailable.
- d) If you run your own business or are partners in a business, then you should show the net worth of the business. Shares in a company not listed on a stock exchange should be valued at the relevant proportion of the net value of the company.
- e) In the case of second homes and/or other properties, these should also be included at their estimated current market value; no allowance will be made for any outstanding mortgage.

## 6. Parents'/Applicants' Liabilities

Details of other significant amounts owed by you should be provided along with details of the lender.

## 7. Dependent Children

Use column number 1 for the child for whom you are now applying at his/her current school rate. Enter in other columns any other of your children who are unmarried and at a school, university or other educational institution which attracts a county grant.

e) The figures to be inserted here refer to the current academic year.

g) (ii) Insurance Policies for School Fees – If any insurance policy for the payment of School fees exists, then the amount declared is the amount receivable under the policy for the academic year for which the application is being made. If the insurance policy covers the full cost of the tuition fees, then the pupil is not eligible for a grant. The types of policy concerned are those which stipulate that the company shall pay the school fees, in whole or in part, to the school in respect of the pupil.

(iii) Where a Trust has been established in favour of the child for whom you are applying, details of the annual amount available and the date of commencement of payment from the Trust should be given. Where the child has any unearned income, eg interest from National Savings, bank or building society deposits, or receives share dividends, you should enter the source of income and the gross amount received before deduction of any tax. Do not include any income from part time employment or student grants. You should enter the capital value of any beneficiary or other trust set up for each child.

## 8. Other Dependents

If you qualify for a Carer's Allowance, or have an aged grandparent or relative living with you or dependent upon you, please provide details including age, address, condition, etc.

## 9. Any Other Relevant Information

Please enter, on a separate sheet if necessary, any details which may affect the assessment of a grant, eg a significant change in income or outgoings for the coming year.